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Reporter

Hello! What a year these past two weeks in American politics have been, huh? This absolute deluge of breaking news had me thinking about how financial advisors are navigating potentially fraught political conversations with their clients, especially when they might not see eye-to-eye.

The advisors I spoke with said it's important to face these charged interactions head-on instead of shying away from them as the presidential election season heats up. I hope you'll check it out, along with the rest of my stories from the past week.

As always, thank you for reading. Talk to you next Wednesday!

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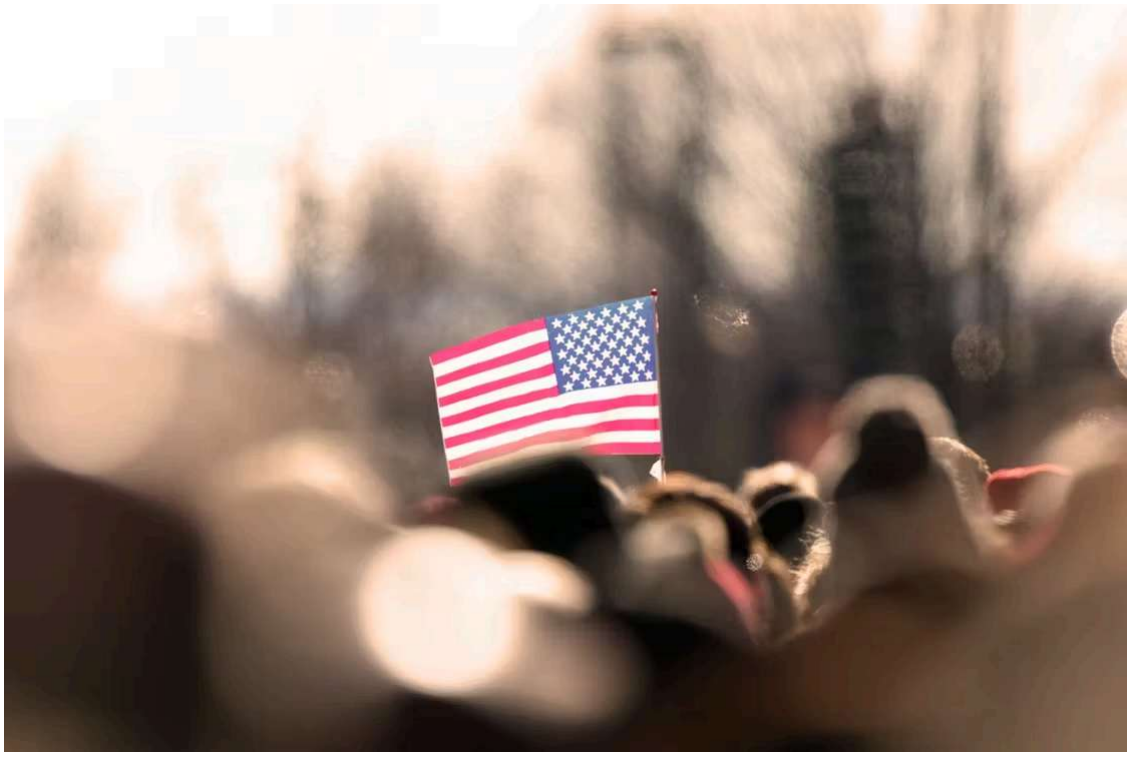
How financial advisors navigate working with clients across the political spectrum



Instead of shying away from fraught interactions as the presidential race heats up, financial advisors say it's important to face them head-on.

- **Career changers reflect on the many paths into financial planning — and offer advice on making the switch**
  Whether they were members of the military, teachers, civil engineers, broadcasters, human resources directors or something else, they all share a desire to examine what profession truly fulfills them and take the often arduous path of reinvention.
- **FINRA plans to raise regulatory fees to stem losses**
  Meanwhile, several top executives at the regulator saw their pay rise in 2023 as compared to the previous year.
- **What values-based investing means to religious clients can vary widely**

Financial advisors who cater to investors who want to put their money where their faith is say what is screened out all depends on several different factors.

- **Ask an Advisor: Is it a good idea for financial planners to hire an advisor for their own families?**
  A financial advisor in North Carolina is looking for a fee-only advisor to offer an advice-only model for his own family. Is this a good idea? If so, what are the considerations?

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